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Date

Signature

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

First Named Inventor: Dori Laskin et al

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Conf. No.:

§ Group Art Unit:

§

Appln. No.: 10/709,360

§ Examiner:

§

Filing Date: April 29, 2004

§ Attorney Docket No.: 160245-87US

§

Title: METHOD AND APPARATUS FOR DETERMINING PERSONAL QUALIFIED
DIVIDEND INCOME AND GENERATING INFORMATION STATEMENTS
THEREOF

INFORMATION DISCLOSURE STATEMENT UNDER 37 C.F.R. §1.97(b)

Enclosed is Information Disclosure Citation Form PTO/SB/08A, which cites documents which may be material to the patentability of this application and/or for which there may be a duty to disclose in accordance with 37 C.F.R. §1.56.

In accordance with the official waiver posted July 11, 2003, wherein the U.S. Patent and Trademark Office officially waives the requirement under 37 C.F.R. § 1.98(a)(2)(i) for submitting copies of each cited U.S. Patent and U.S. Patent Application Publications with respect to applications filed after June 30, 2003, we have not included copies of such cited U.S. Patent and U.S. Patent Application Publications. However, we will provide copies upon request. Copies of the non-patent references are attached hereto for the Examiner's convenience.


The filing of this Information Disclosure Statement shall not be construed as an admission that any of the listed documents constitutes prior art, nor as an admission against interest in any manner.

No fee is believed to be due in connection with the filing of this Information Disclosure Statement since it is being filed before the mailing date of the first Office Action on the merits. However, the Commissioner is hereby authorized to charge any deficiencies or credit any overpayments to Deposit Account No. 50-1017 (160245.0087).

It is respectfully requested that this Information Disclosure Statement and the documents listed on the attached Form PTO/SB/08A be considered and acknowledged by the Examiner in connection with the above-identified patent application, be made of record therein, and that the listed documents be cited in the issued patent.

Respectfully submitted,

Dori Laskin et al.



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Enclosures

Form PTO/SB/08A		PATENT & TRADEMARK		Complete if Known		
INFORMATION DISCLOSURE STATEMENT BY APPLICANT (use as many sheets as necessary)				Application Number	10/709,360	
				Filing Date	April 29, 2004	
				First Named Inventor	Dori Laskin	
				Group Art Unit		
				Examiner Name		
Sheet	1	of	1	Attorney Docket Number	160245-87US	
U.S. PATENT DOCUMENTS						
Exr Initials	U.S. Patent Document		Kind Code (if known)	Name of Inventor or Applicant of Cited Document	Date of Publication of Cited Document MM-YYYY	
	Number					
FOREIGN PATENT DOCUMENTS						
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	Country Code	Number	Kind Code (if known)			
OTHER PRIOR ART - NON PATENT LITERATURE DOCUMENTS						
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	Change in Dividend Tax Rate and Expectations, New release date: July 10, 2003, Copyright © 2003, Asher & Company, Ltd., printout from Asher & Company web site: http://www.asherco.com/news/2003/071003b.htm , printout date: October 22, 2003, 2 pages.					X
	Allison, G. "The 'Simple' Tax Act," Article date: June 2003, Copyright © 2003, Northern Trust, printout from link on Northern Trust web site: http://www.ntfs.com/library/personal/taxact/ , printout date: December 8, 2003, 2 pages.					X
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Examiner Signature					Date Considered	

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Kind Code - see Phila Doc # 141729